

Collier County Public Schools

# DocVault

Student Electronic  
Cumulative Records



Collier County Public Schools  
Technology Department

# DocVault User Guide

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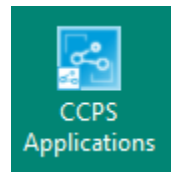
DocVault is our document management software, which enables us to store student records electronically and provides secure access from virtually anywhere.

### Access DocVault

Not everyone has access to DocVault. DocVault permissions are automatically assigned and set based on job code. Refer to the Access Control List. Teachers, parents, and students do not have access to docvault.

To access DocVault:

1. Locate the CCPS Applications icon on your desktop.
2. Double-click the icon to display the Zenworks window.
3. Under General Software, locate the DocVault icon.

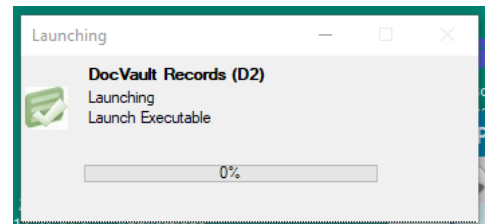


Note: To add a shortcut to your desktop, drag the docvault icon from the ZENworks window to your desktop.

4. Double-click the DocVault icon.



An installation prompt will appear if it is your first time accessing DocVault on your computer.



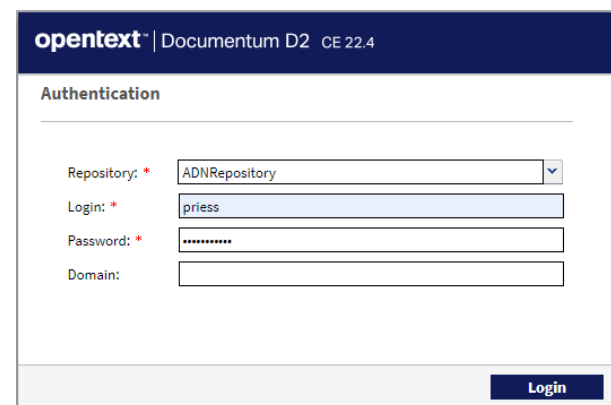
5. The OpenText | Documentum (D2) login webpage will open using the Chrome web browser.

**DocVault is intranet only, and Chrome is the recommended browser for this application.**

### Log into DocVault

To log in to DocVault:

1. Enter your current network username and password. This is the same username and password you use to log in to your computer. Note: The username is case sensitive and depends on how it appears in the Outlook Address Book. For example, if my name is Sara Times and my username is timesS, but in the address book it appears as TimesS, then I would enter it as TimesS.
2. Press enter or Click the login button in the lower right corner.

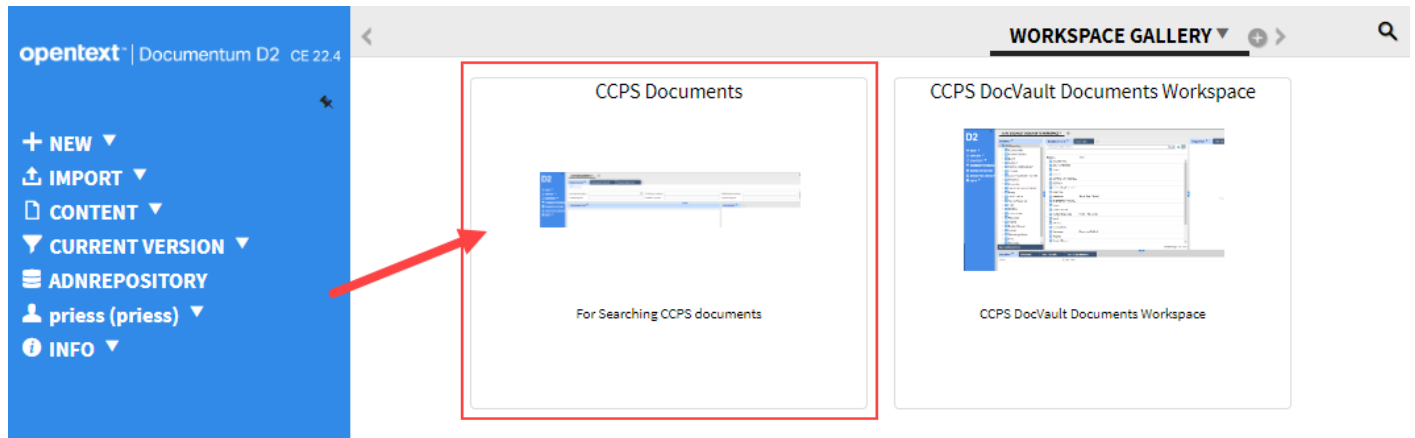


**If you are unable to log in, notify the Technology Help Desk via email [helpdesk@collierschools.com](mailto:helpdesk@collierschools.com) for further assistance.**

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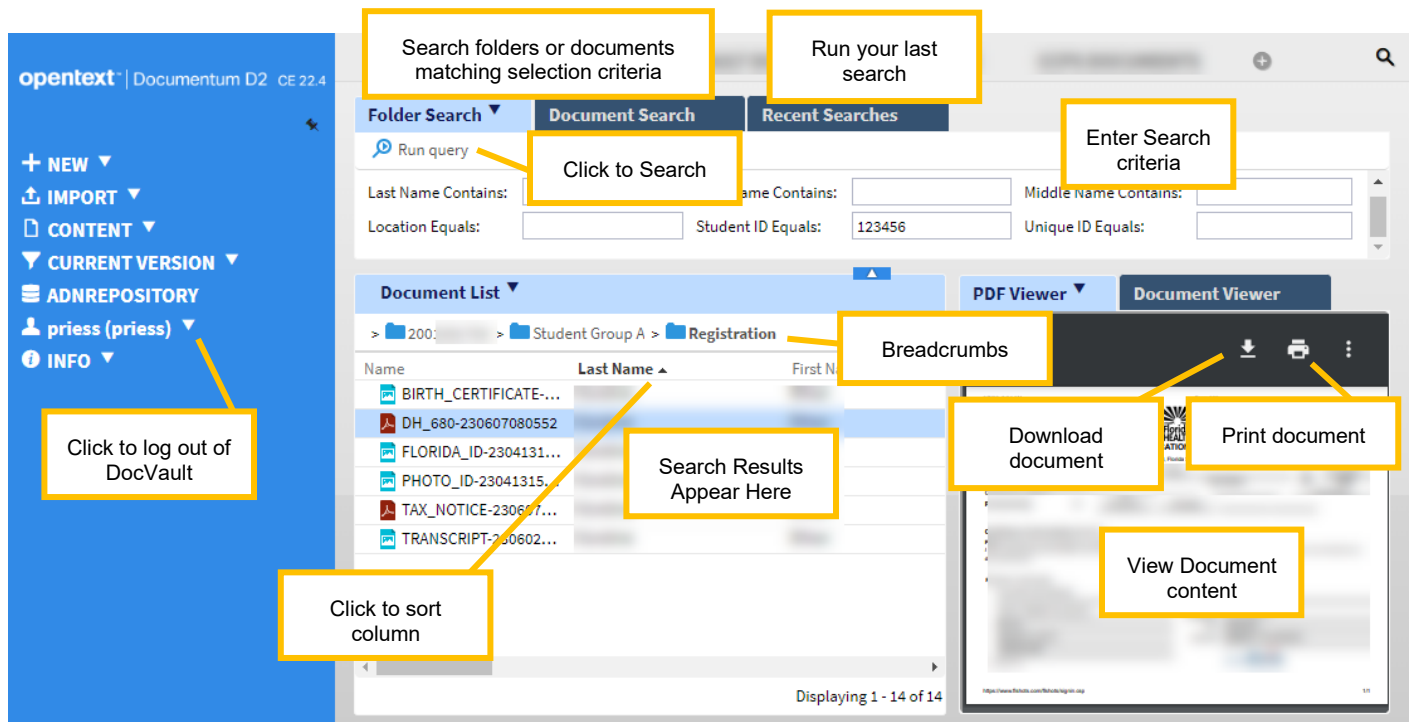
## Workspace Gallery

When you first connect to D2, you will see receive a prompt to select a default workspace view. **Select CCPS Documents.**



## CCPS Documents Workspace

Document workspace is your landing page. It consists of areas, lists, tabs, sidebars, and viewers.



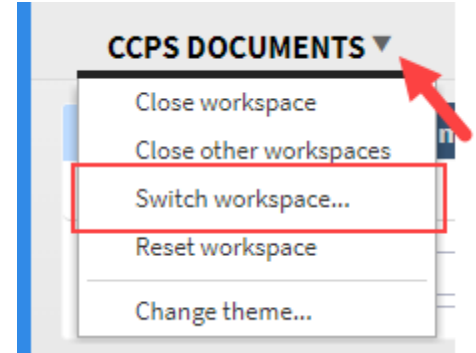
## DocVault User Guide

### Switch your Workspace

If the incorrect workspace was selected, you will need to switch your workspace. For example, if you selected DocVault Documents Workspace instead of CCPS Documents Workspace.

To switch your workspace:

1. Click the down arrow next to the Workspace tab at the top of the screen.
2. Select Switch Workspace.
3. Select the desired workspace from the Workspace Gallery.

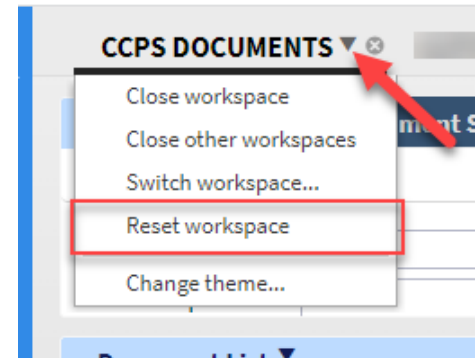


### Reset your Workspace

On different occasions you may have to reset your workspace. For example, if there has been an update or your PDF Viewer tab does not display.

To reset your workspace:

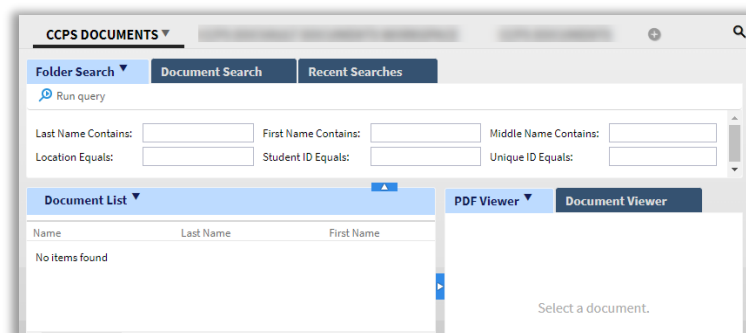
1. Click the down arrow next to the Workspace tab at the top of the screen.
2. Select Reset Workspace.
3. The workspace will restore to its default configuration.



## DocVault Interface

Once you have logged into DocVault, the Folder Search homepage will display. DocVault's interface consists of tabs, areas, lists, folders, subfolders, and documents.

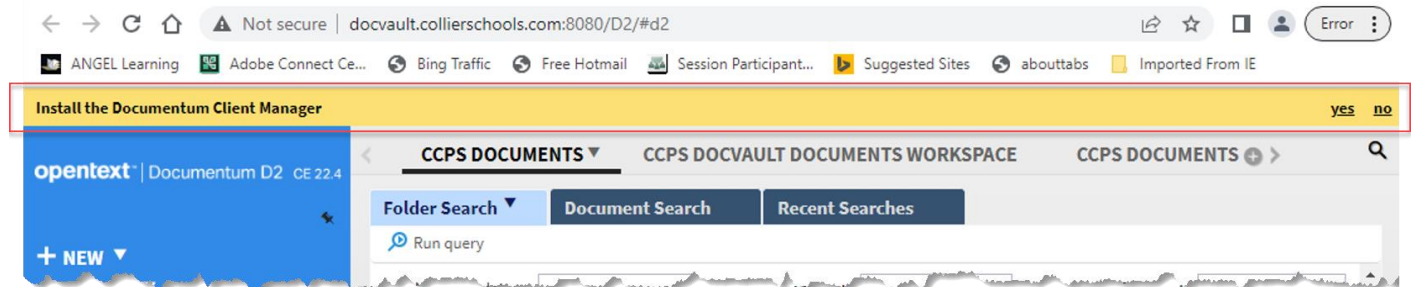
1. The **Folder Search** and **Document Search** tabs are used to search for a record or document.
2. Search terms are entered in the **Search Criteria Input Area**
3. Search results display in the **Document List Area**
4. Opened documents display in the **PDF Viewer/Document Viewer** section.



# DocVault User Guide

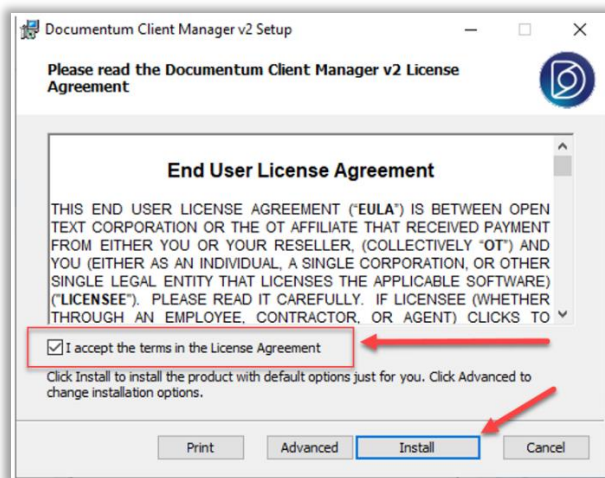
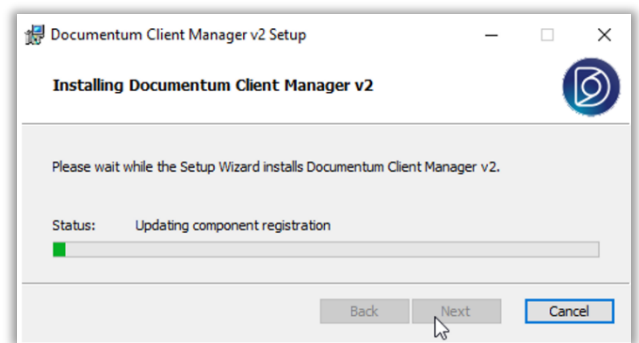
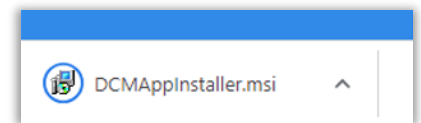
## Documentum App Installation Prompt

You may receive a yellow header at the top of the screen prompting you to install the Documentum Client Manager.



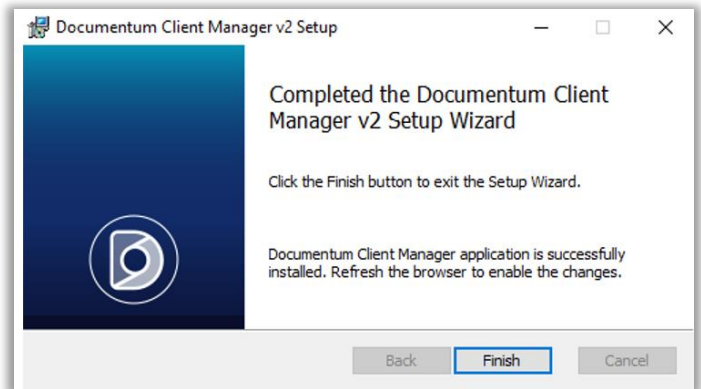
If so, do the following:

1. Click Yes.
2. The installation file will download in the bottom left corner of your screen.
3. Click directly on the file to start the installation process.
4. The End User License Agreement will display. Select the checkbox to accept the terms of the agreement, and Click the Install button.
5. The installation will start.



6. The Security Warning screen will appear. Click Yes to continue with the certificate install.
7. Click Finish.

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## Record Availability

Schools can only view records for students actively enrolled at your school or if your school was their last attended school.

Records for newly enrolled students will not be available until the next business day.

Records for students transferring from one CCPS school to another do not reflect in DocVault until the next day.

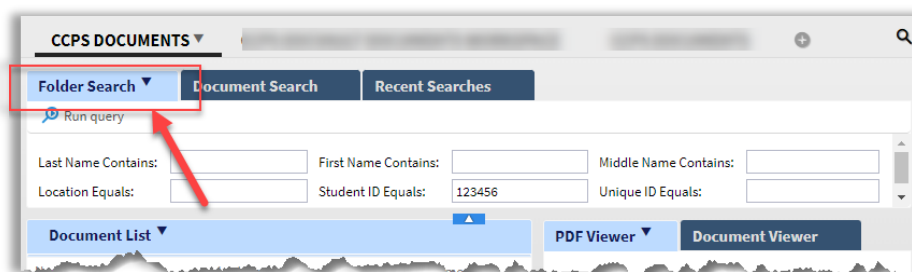
## Search for a Record

### Search Tabs

You will utilize the folder search and document search tabs to search for a document.

### Folder Search

The Folder Search tab allows you to input search criteria and displays search results using the root folder and subfolder filing hierarchy. In other words, you must navigate through the root folder and subfolder before viewing available documents.



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## Document Search

The Document Search tab allows you to input search criteria and only returns search results in document format. Root folders and subfolders are not present.

Both tabs contain a search criteria input area and search results list area.

## Recent Searches

The Recent Search tab allows you to run your last search, any saved searches, or any saved public searches.

## Search Criteria Input Area

The Search Criteria Input area is where the search truly begins. This is where you enter your search criteria (such as Last name, first name, or student ID, etc.) to search for a specific student record.

## DocVault User Guide

Before searching for a student record, you should always ask yourself

- Does the student meet DocVault criteria?
- Is this student enrolled at your school?

You will only be able to view records for students who are enrolled at your assigned school.

### Entering Search Terms

Before you begin searching, gather some key information about the student. For example, the student's ID number is a sure identifier. If the ID number is unavailable, then the correct spelling of the student's first and last name with a date of birth would suffice.

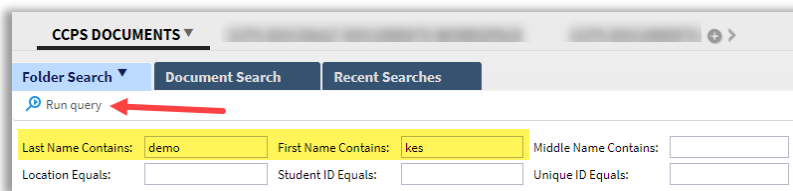
Remember, be selective with search terms. Utilize the Student ID# or Unique ID# to get the best results. **It is not necessary to fill in every field.**

You can search for a student's record by name, ID, or unique ID.

### Name Search (Last and/or First)

To search by Last name and/or First Name

1. Enter a couple letters of the last name and a couple letters of the first name.
2. Click the Run Query button.



CCPS DOCUMENTS

Folder Search | Document Search | Recent Searches

Run query

Last Name Contains: demo First Name Contains: kes Middle Name Contains:

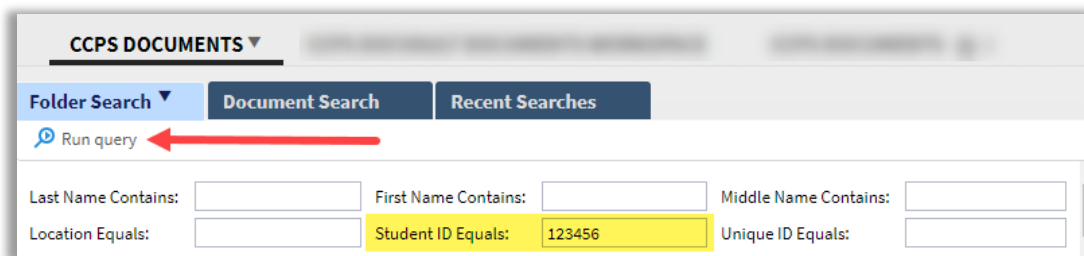
Location Equals: Student ID Equals: Unique ID Equals:

### Student ID Search

To search by Student ID number

1. Enter the 6-digit student ID number in the Student ID field.
2. Click the Run Query button.

The student ID number can be obtained from our current student system.



CCPS DOCUMENTS

Folder Search | Document Search | Recent Searches

Run query

Last Name Contains: First Name Contains: Middle Name Contains:

Location Equals: Student ID Equals: 123456 Unique ID Equals:

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## Unique ID Search

Each student is assigned a 10-digit unique ID number. The unique ID is student specific and is only referenced or used within DocVault. It is not available/accessible elsewhere and would usually be provided by a Records Specialist.

To search by Unique ID

1. Enter the 10-digit Unique ID number in the Unique ID field.
2. Click the search button or press enter.

CCPS DOCUMENTS

Folder Search Document Search Recent Searches

Run query

Last Name Contains: First Name Contains: Middle Name Contains:

Location Equals: Student ID Equals: Unique ID Equals: 1000123456

## View Search Results

### Document List

Your search results will display in the document list area. Here information is displayed using columns and rows and organized using root folders, subfolders, and documents.

CCPS DOCUMENTS

Folder Search Document Search Recent Searches

Run query

Last Name Contains: First Name Contains: Middle Name Contains:

Location Equals: Student ID Equals: Unique ID Equals:

Document List

| Name       | Last Name | First Name | Middle Name | Location | Student ID | Unique ID | Last 4 Soc Sec | Grade |
|------------|-----------|------------|-------------|----------|------------|-----------|----------------|-------|
| 2001588677 | Re        | Ar         |             | NHS      | 48         | 2001      |                | 99    |
| 2001588674 | Me        | Ju         |             | PSE      | 48         | 2001      |                | PK    |
| 2001588670 | Mi        | Er         |             | BCE      | 48         | 2001      |                | KG    |
| 2001588667 | Re        | Ar         |             | NHS      | 48         | 2001      |                | 99    |
| 2001588665 | Br        | Ch         |             | VES      | 48         | 2001      |                | KG    |
| 2001588661 | Lo        | Ch         |             | CAC      | 48         | 2001      |                | 30    |

What does this mean?

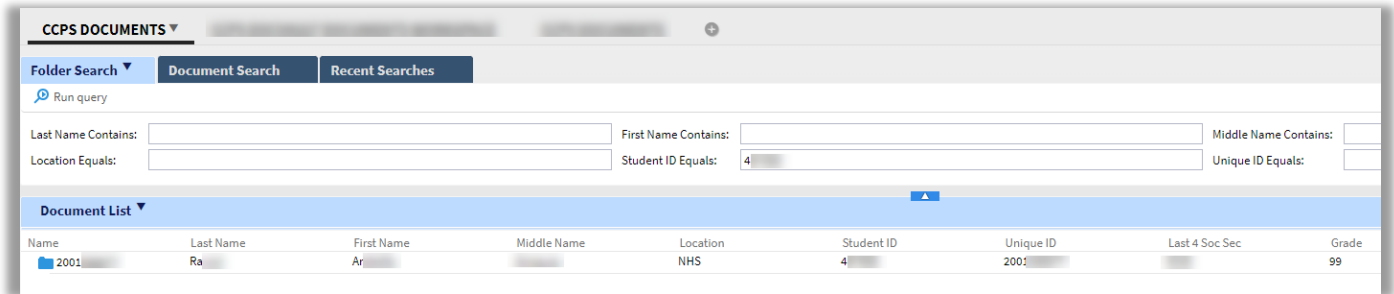
- Rows display a student's root folder, subfolder, or documents.
- Columns display available metadata or information about the student.
- Results can be sorted by clicking on any of the column headers.
- Columns can be resized by placing your cursor on the line between columns and dragging to adjust the width.
- Columns can be reordered by clicking the column header and dragging it to another location.

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## Folders, Subfolders, and Documents

An electronic student record comprises a root folder, a subfolder, and documents. A root folder contains subfolders, and subfolders contain documents.

**Root Folder** – Each student in our student system will have a root folder listed in DocVault, regardless of whether they meet DocVault criteria. The root folder contains all subfolders, such as Category A, Category B, ESE, ELL, etc.



CCPS DOCUMENTS

Folder Search | Document Search | Recent Searches

Run query

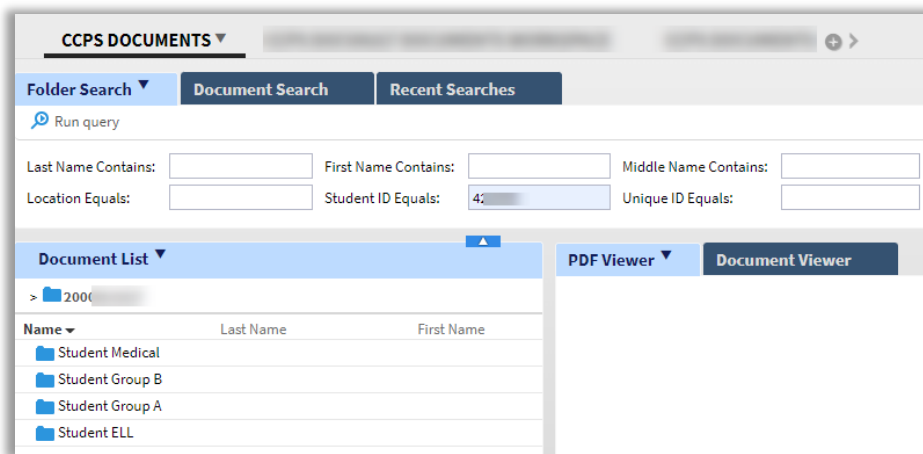
Last Name Contains:  First Name Contains:  Middle Name Contains:

Location Equals:  Student ID Equals:  Unique ID Equals:

Document List

| Name | Last Name | First Name | Middle Name | Location | Student ID | Unique ID | Last 4 Soc Sec | Grade |
|------|-----------|------------|-------------|----------|------------|-----------|----------------|-------|
| 2001 | Ra        | Ar         |             | NHS      | 4          | 2001      |                | 99    |

**Subfolders** – Subfolders are created based upon adding contents for the specified section. They contain individual documents pertaining to the selected subfolder. For example, the Group A folder may contain supporting documents for registration, certificate of birth, immunizations, etc. A subfolder will not be listed if documents have not been scanned into it.



CCPS DOCUMENTS

Folder Search | Document Search | Recent Searches

Run query

Last Name Contains:  First Name Contains:  Middle Name Contains:

Location Equals:  Student ID Equals:  Unique ID Equals:

Document List

> 2001

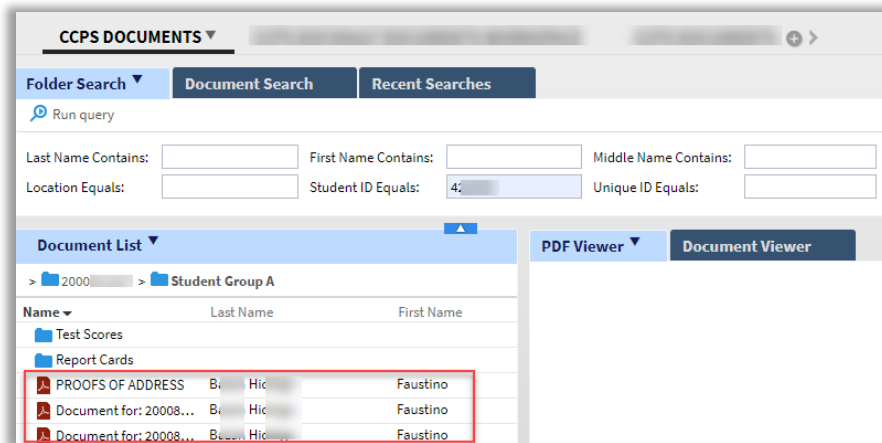
| Name            | Last Name | First Name |
|-----------------|-----------|------------|
| Student Medical |           |            |
| Student Group B |           |            |
| Student Group A |           |            |
| Student ELL     |           |            |

PDF Viewer | Document Viewer

Subfolders Included but not limited to: Group A, Group B, MED, LGL, 504, ELL, ESE, PSY, ALT, GFT, PRO, BEN

**Documents** – Any paperwork added to a student's electronic record is scanned or electronically uploaded into DocVault by our Records Department. Documents are in PDF or image file types and are searchable.

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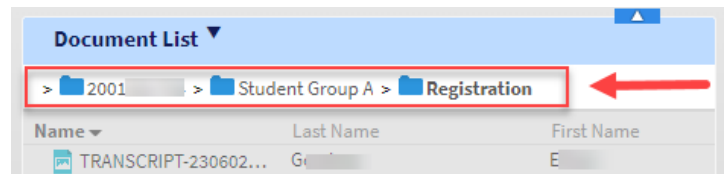


## Breadcrumbs

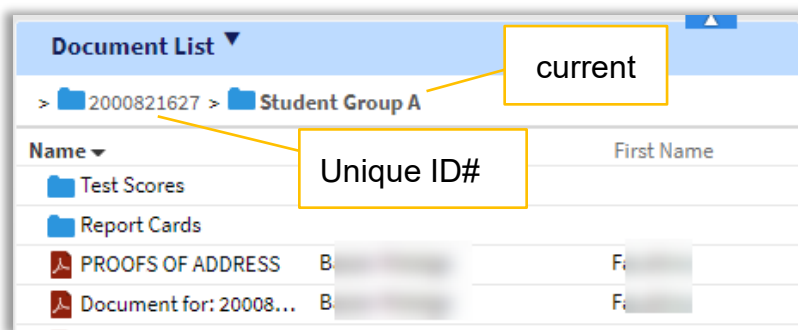
As you open folders and subfolders, the folder breadcrumbs will appear in the upper left corner of the search criteria area. **Breadcrumbs** help identify where you are within the **folder structure**.

Breadcrumbs are available depending on the selected folders and subfolders.

Breadcrumbs are used to maneuver between sections of the electronic cumulative folder.



Click the **UNIQUE ID#** to view other available subfolders in the current student's record.



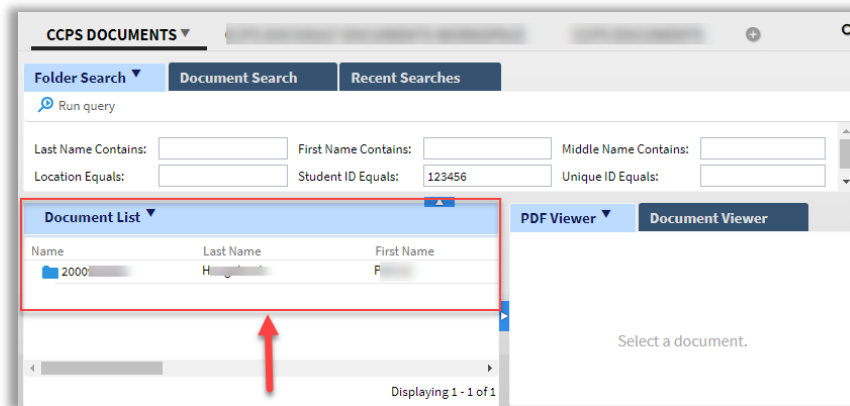
## Start a New Search

To start a new search:

1. At the top of the screen, enter your search criteria.
2. Click Run Query.

Your search results will display in the Document List area.

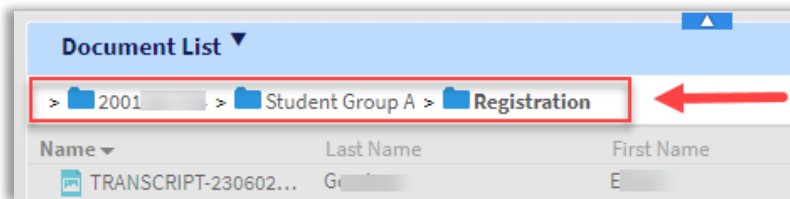
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## Continue a Search

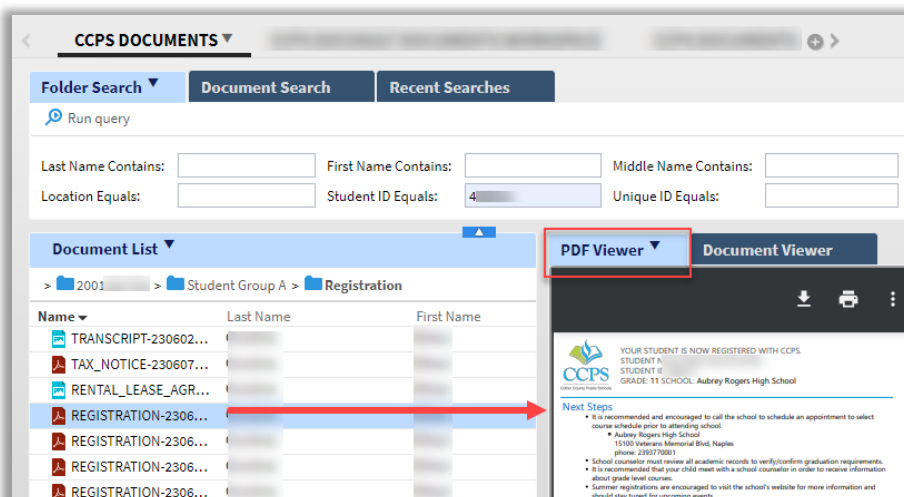
To continue a search within the current student's folder:

1. Click the breadcrumb link.
2. The subfolders for the current student will display.



## View a Document

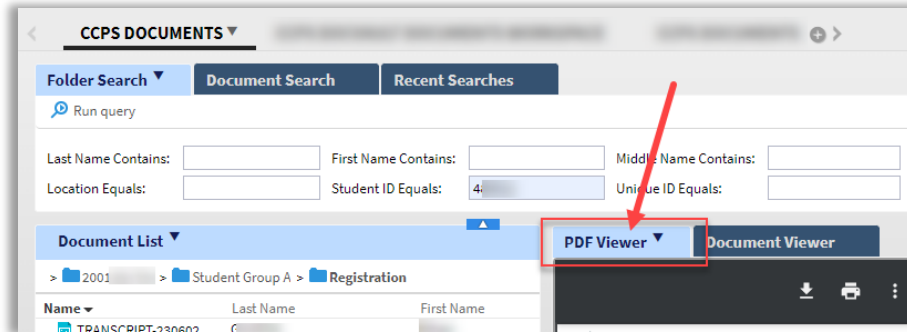
1. Search for a document or drill down from a folder view.
2. Click the document once to select it.
3. View the PDF in the PDF Viewer section on the right side of the screen.



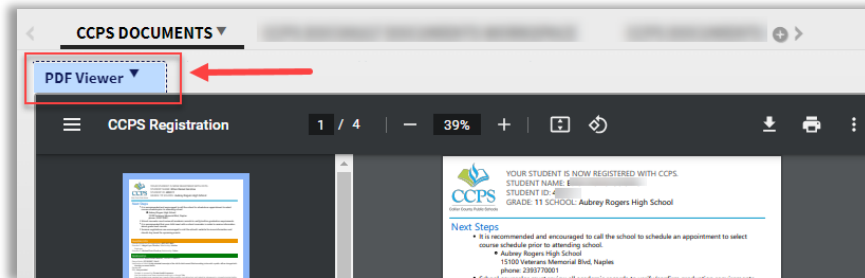
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## PDF Viewer

Double-click the tab labeled “PDF Viewer” to expand that tab to the entire screen.



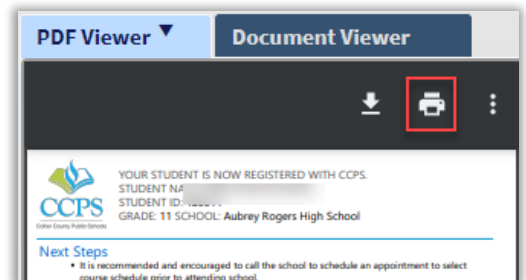
Double-click the tab again to collapse the image back to the original size.



**If the PDF Viewer tab does not display, you must reset your workspace.**

## Print a Document

1. From the PDF Viewer window:
2. Click the printer in the upper right portion of the displayed PDF.

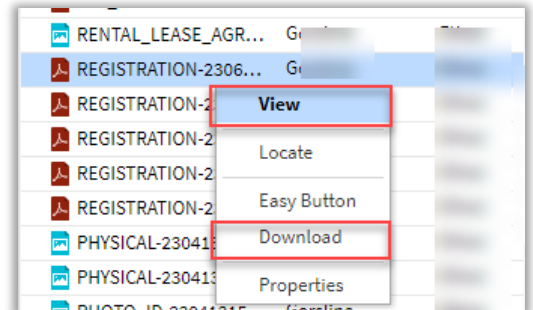
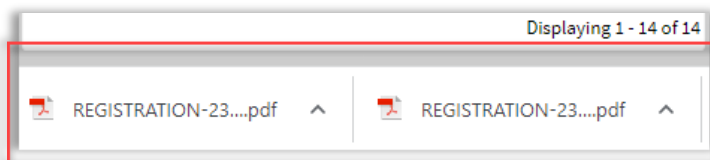


## Download a Document

You can download a document from the document list area or the PDF viewer.

From the Document List area:

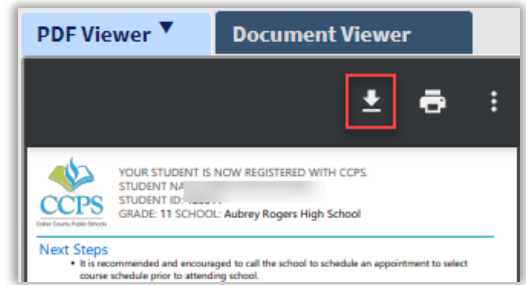
1. Right-click on the document you want to download.
2. Select View or Download.



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From the PDF Viewer window:

1. From the document list, click the document once to select the document you want to view.
2. The document will display in the PDF Viewer on the right.
3. Click the downward arrow and follow the prompts.



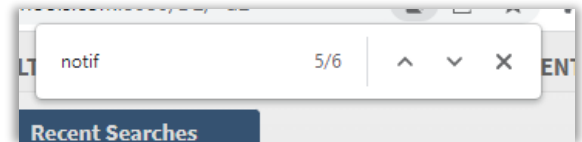
Note: The Document Viewer does not offer a download option. For documents that are only viewable within the Document Viewer (e.g., JPG files), you must download them directly from the Document List.

## Search Document Content

A quick way to locate a specific document (i.e., birth certificate, etc.) within the open items window is by searching the PDF document content.

### Basic Search

1. Press the Ctrl + F key on your keyboard simultaneously. A search box will display in the upper right corner of the screen.
2. Type the keyword or phrase you want to search for in the search box.



Note: Be selective about keywords and phrases. For example, if you are searching for a birth certificate. Try the keyword/phrase "certification of birth".

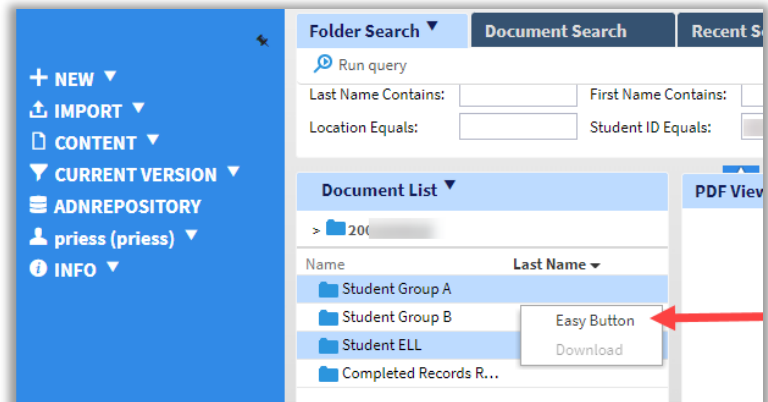
3. Press Enter. Use the small left and right arrows in the blue search box to skip to the previous or next instance of the specified keyword/phrase.

## Create Merge Document (Easy Button)

This feature allows you to create a merged document that includes all documents within selected folders. It is mainly used when preparing a file for a records request. Only specific users have access to this feature.

To create a merge document:

1. Open the students main folder.
2. Select one or more folders in the list (shift-click or ctrl-click for selecting multiple folders).  
Note: Do Not select the Completed Records Request folder.
3. Right-click one of the selected folders.



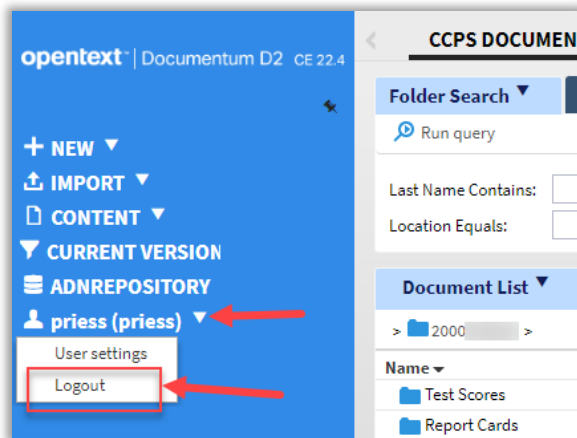
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4. Select “Easy Button” from the popup menu.
5. The merged document is placed in the “Completed Records Request” folder.

## Log Out of DocVault

The log out of DocVault:

1. Click the drop-down arrow next to your username from the main menu on the left sidebar.
2. Click Logout.



Your docvault session will timeout after 5-10 minutes of inactivity.

## Reminders

### Accessing

- CCPS Applications icon on desktop > general software

### Logging On

- Do you meet DocVault access criteria?
- Use your Network Username and Password.
- Username should be entered using proper casing.

### Searching

- Folder Search Tab
- Is student enrolled in your school?
- The Student ID# is a sure identifier.

### Viewing

- Document List / PDF Viewer
- File hierarchy: Root folder/subfolder(s)/document(s)
- Searchable PDF file format.
- Ctrl + F to search within an open document.